WHY SHOULD I CRAFT A MISSION STATEMENT?

**WHEN A WELL-DEFINED MISSION, PHILANTHROPIC FUNDS CAN DRIFT AWAY FROM DONOR'S WISHES**
- Clarifies philanthropic goals
- Ensures deliberate and thoughtful philanthropy
- Defines geographic area
- Identifies board members committed to your objectives
- Clarifies for grant-seekers what you will and will not fund
- Reduces the likelihood of violating donor intent
- Helps determine which family members, if any, to involve
- Makes it easier to say no to off-mission funding requests

**EXERCISES TO GET STARTED**

1. **CRAFT A STORY**
   - Imagine a real person who benefits from your philanthropic endeavor.
   - What is her condition prior to your philanthropy?
   - How did she find you or the nonprofit your philanthropy supports?
   - Be concrete in identifying the need or want that your philanthropy fills.

2. **HOW ARE YOU DIFFERENT?**
   - Can you describe how you are different than other funders?
   - What mistakes do you see other donors making?
   - Who do you admire most in philanthropy, and why?
   - What are the common mistakes you see in charitable giving?
   - Identify examples of nonprofit leaders who frustrate or delight you.

3. **DEFINE YOUR PHILANTHROPIC VALUES**
   - Examine which contributions gave you the most satisfaction, which ones disappointed you, and why.
   - Through your giving what do you want to sustain, protect, or advance?
   - What changes do you want to see in charitable giving?
   - What character traits does your giving promote, e.g., integrity, humility, dignity, fairness, or entrepreneurial spirit?

**PRACTICAL STEPS TO CREATE YOUR MISSION STATEMENT**

1. **IDENTIFY PEOPLE**
   - Board of directors, trustees, and officers.
   - Close associates of the donor; people who can speak to the donor’s principles, values, and passions.
   - Foundation management and staff.
   - Leaders of grant recipients you admire and work with closely.

2. **GATHER INFO**
   - Create a list of people from step 1, including contact information and association with the donor/foundation.
   - Ask board, staff, and grantees what they think is your core purpose.
   - Gather their input about why they think you do philanthropy.
   - Gather other mission statements from other philanthropic organizations.
   - Locate current mission statement, if one already exists.

3. **MEET WITH KEY PEOPLE**
   - Gather a few key people involved in your philanthropy and process what you have thus far.
   - Ask the question again: why do we exist?
   - Synthesize what you already know.
   - Identify the main ideas and document them in writing.
   - Don’t write substantial text in committee.

4. **REVIEW AND REVISE**
   - Draft a couple of different ways to express the mission statement.
   - Plan on an iterative process.
   - Cut out buzzwords. The same word can mean different things to different people. Make sure readers understand your core principles.
   - Make it readable and memorable for everyone.

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